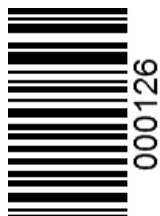




PERSONAL RETIREMENT SAVINGS ACCOUNT (PRSA) - TRANSFER OUT FORM



Before you give us your personal information it is important that you know what your data protection rights are and how and why we use your personal information. This is set out in the Irish Life Data Privacy Notice which is always available on our website at <https://www.irishlife.ie> or you can ask us for a copy.

Section 1 - Contributor details

Plan number

Contributor name

Has this PRSA been used to make Additional Voluntary Contributions (AVCs)? Yes ☐ No ☐

If you answered yes to the above question we may need to contact you with further questions.

Section 2 - Transfer options

Please tick which transfer option you are choosing under your PRSA

Option 1 Transfer to another approved PRSA ☐ **Complete sections 3, 5 and 6**

Or

Option 2 Transfer to an approved Occupational Pension Scheme ☐ **Complete sections 4, 5 and 6**

Is the receiving scheme a small self-administered scheme? Yes ☐ No ☐

If you answer Yes to the above question we need a copy of the Revenue approval letter in order to proceed.

Or

Option 3 Transfer to a pension scheme overseas ☐ **Complete sections 5, 6 and also the separate Overseas transfer out form.**

I understand that Irish Life are required, under Section 787G of the Taxes Consolidation Act 1997 to deduct income tax, PRSI and the Universal Social Charge from my PRSA if I transfer it overseas. ☐

I confirm that I want to proceed with this overseas transfer request.

Country where new scheme is contracted

Are you currently employed in that country? Yes ☐ No ☐

Section 3 - Transfer to another PRSA

Name of PRSA provider receiving the transfer

Receiving PRSA plan number

Cheque payee

Address to which cheque will be sent

- Is your company an approved PRSA provider under Part X of the Pensions Act 1990, as amended? Yes ☐ No ☐
- Is the PRSA contract to which the transfer is being made an approved PRSA product under Part X of the Pensions Act 1990 and Chapter 2A, Part 30 under the Taxes Consolidation Act 1997, as amended? Yes ☐ No ☐

Declaration of the new PRSA Provider

I declare, on behalf of the above named PRSA provider, that the contributor named above is taking out or already has an approved PRSA plan with our company. I declare that this company is willing to accept the transfer from the Irish Life plan numbered above to our plan.

Name of the person authorised on behalf of the company

Signature of the person authorised on behalf of the company

Department

Date

Note: The overseas transfer form must be completed by PRSA contributor and the receiving scheme in addition to this form.

To be completed by the new PRSA provider.

Section 4 - Transfer to an Occupational Pension Scheme

To be completed by the Trustee of the receiving Occupational Pension Scheme

Name of the insurer	<input type="text"/>
Employer name	<input type="text"/>
Receiving plan/scheme number	<input type="text"/>
Name of the pension scheme	<input type="text"/>
Pensions Board Number	<input type="text"/>
Revenue Approval Number	<input type="text"/>
Name and address of trustees	<input type="text"/> <input type="text"/> <input type="text"/>
Is the scheme?	(1) Defined contribution <input type="radio"/> (2) Defined benefit <input type="radio"/>
Cheque payee	<input type="text"/>
Address to which cheque will be sent	<input type="text"/> <input type="text"/> <input type="text"/>

Trustee declaration

I, the trustee, declare that is a member, or prospective member of our pension scheme and I am willing to accept a transfer payment from Irish Life on his/her behalf. I declare that the scheme is an approved scheme under the Finance Act 1972 or Chapter 2 of the Taxes Consolidation Act 1997, as amended, and that the information given above is correct.

Trustee name (CAPITAL LETTERS)	<input type="text"/>
Trustee signature	<input checked="" type="text"/>
	Authorised to sign on behalf of the scheme
Date	<input type="text"/>

Section 5 - Pension Adjustment Order

Has a Notice to Trustees been received in connection with a judicial separation or divorce in respect of any policies listed in section 1?	Yes <input type="radio"/> No <input type="radio"/>
Has a Pension Adjustment Order been issued or is in the process of being issued on any of the policies listed in section 1?	Yes <input type="radio"/> No <input type="radio"/>

If this section is not completed, we will assume that a Notice to Trustees or a Pension Adjustment Order has not been issued on the pension plan(s).

Section 6 - Customer/Member declaration (to be completed in all cases)

Contributor/ Member declaration

I confirm that I wish to transfer benefits held under my PRSA plan numbered above to PRSA/Occupational Pension/Overseas Pension as outlined in the above sections. I understand that no pension and/or life assurance benefits will be provided for me under the Irish Life PRSA with effect from the date of transfer. In consideration of the payment of an appropriate transfer to the selected scheme/ PRSA, I hereby release Irish Life Assurance plc for all liability of benefits there under with effect from the date of such transfer.

Contributor signature	<input checked="" type="text"/>
Date	<input type="text"/>

If YES – Please provide a copy of the Notice to Trustees or Pension Adjustment Order.